

DRAFT

**The Department of Energy
Education, Training and
Development
BUSINESS PLAN**

*Education, Training and Development Challenges
Toward the Year 2000*

February 1999

**Training and Development Management Council
U.S. Department of Energy
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Why a Business Plan?

According to Linda Elkins, author of *Let's Write A Business Plan Together*, a business plan is “a formal presentation of the resources, goals, plans and future outlook of a business.” A well-written, comprehensive business plan forms the basis for the success of any organization and is not intended as an exercise in idealistic projections. The business plan should clearly define the goals of a business and outline the methods for achieving them. It should be a useful document that guides the organization in decision-making.

The Department of Energy Education, Training and Development Business Plan (the Plan) represents the next step in carrying forward key corporate training initiatives defined by the Training and Development Management Council (The Management Council). There is a need for an action plan that is aligned with DOE's Strategic Plan, the Secretary's Workforce 21 Initiative, Executive Order 13111 “Using Technology to Improve Training Opportunities for Federal Employees,” and incorporates Government Performance Results Act (GPRA)-related performance measures. The Plan will be a critical tool in assisting the Dept. to rebuild a talented and diverse workforce and in answering the Congressional call for more aggressive progress on DOE's corporate approach to training. The Plan demonstrates to key investors and stakeholders that DOE is serious about meeting its corporate training needs in a cost-effective and quality manner.

The Plan is laid out in five sections:

Executive Summary

Provides an overview of the Plan.

Business Description

Describes the purpose, mission and vision, goals, and performance objectives.

Products and Services

Highlights the major corporate initiatives that support the goals and objectives.

Marketing Plan

Discusses the methods that will be used to reach out to the target audience and convince them to support the corporate approach and its products and services.

Financial Management

This section outlines the resources and identifies the cost of successfully implementing the Plan. Implementation, anticipated value and evaluation of the Plan are also discussed in this section.

EXECUTIVE SUMMARY

Executive Summary

What is the Current Situation?

The Department of Energy is at a critical juncture. The Department has an aging workforce and must address (1) the potential loss of critical skills over the next three to five years, (2) the need for improved technical competence, and (3) a critical need to attract and retain a diverse workforce.

Over the past two and a half years, the Department of Energy has undertaken a major re-engineering of its education, training and development function to address these issues. The new way of doing business is a corporate approach to training within the Department of Energy. The challenge has been to develop an effective alliance of training organizations across the Department to provide for central management while maintaining decentralized operations.

In addition, the Department of Energy continues to face reduced funding for training as well as Congressional pressure for increased accountability of its training activities. The General Accounting Office (GAO) has conducted a series of audits that examined training costs, progress on training improvement initiatives and contractor training programs. Also, the Government Performance and Results Act (GPRA), the DOE Strategic Plan, and the Secretary's Performance Agreement with the President are drivers impacting how the agency conducts training activities.

What are the Objectives of the Business Plan?

The corporate training performance goal is to “ **improve and maintain the competence of a talented, diverse workforce in an integrated, cost-effective and quality manner.**”

The Corporate Education, Training and Development Business Plan will be a critical tool to assist the Department in rebuilding a talented and diverse workforce and in answering the Congressional call for more aggressive progress on DOE's corporate approach to training.

The Plan will demonstrate to key investors and stakeholders that DOE is serious about meeting its corporate training needs in a cost-effective and quality manner. The objectives of the Plan will be met through the use of quality management principles, valuing diversity, and continuing to improve human resources systems and practices. The Plan is closely aligned with the DOE Strategic Plan particularly under the Corporate

Management Section's Strategic Goal, Objective 3, Strategies 1 and 4 (See Appendix D).

This Plan continues the re-engineering process set in motion in 1995. It identifies the goals and objectives for the next three years, describes the products and services, outlines a communications strategy for education, training and development activities, and summarizes the financial management issues that must be addressed in order to realize the benefits of approaching education, training and development issues in a corporate manner.

The Plan identifies nine performance objectives to guide the corporate education, training and development program. They are:

- # Improve and maintain workforce competence
- # Provide training, education and career development services in a cost-effective manner.
- # Establish a corporate training management system.
- # Partner with other Federal agencies, state and local governments, academia, and industry to share resources and provide cross-cutting training in a cost-effective manner.
- # Optimize the use of technology-supported learning (TSL).
- # Adopt and apply relevant and established corporate training standards, criteria and metrics for consistent development, delivery, and evaluation of training.
- # Reinvest savings achieved through the efficient operation of DOE's corporate education, training and development program.
- # Implement and evaluate the corporate education, training and development program.
- # Implement steps to improve contractor employee training performance.

Progress has been made. Some of the key accomplishments as a result of the corporate approach to training include:

- # Established a Training and Development Management Council and a Training and Development Coordinating Group.
- # Developed a Corporate Training Policy and Corporate Training Structure.
- # Identified all cross-cutting training courses offered throughout DOE.
- # Established and implemented a Technical Qualification Program.
- # Implemented the Lead Site Program for development of training materials in support of the Technical Qualification Program.
- # Designated two Training Centers of Excellence.

- # Established a formal working relationship with the Office of Information Management, MA-4, to identify and implement a corporate human resource information system that includes training information management features.
- # Developed a business case and project plan for technology-supported learning.
- # Established the Clearinghouse for Training, Education and Development homepage on the World Wide Web (<http://cted.inel.gov/cted>).
- # Established a Universal Catalog of Training Courses Web page (<http://cted.inel.gov/cted/trainidx.html>).

The Plan provides the mechanism to achieve the Performance Objectives, Measures, and Expectations that have been defined by the training community and the Training and Development Management Council.

How will Results be Achieved?

Management Team

The Secretary of Energy chartered the **Training and Development Management Council** to oversee corporate policy, priorities, and direction for the Department's training community. The Management Council meets on a quarterly basis.

The **Training and Development Coordinating Group** was created to serve as staff to the Management Council and coordinate education, training, and development activities conducted by the various Headquarters, field, and contractor organizations across the complex. Members of the Coordinating Group participate in monthly teleconferences. Face-to-face meetings are held as needed.

Roles and Responsibilities

As members of the Management Council, each member is responsible for the implementation of the Plan and will be held accountable for carrying out the actions in this Plan. Management Council members will determine the methods to secure and commit the necessary resources to ensure that the performance expectations are met.

DOE's contractors are expected to be partners in the implementation of the Plan. Through revisions to DOE Order 350.1 "Contractor Human Resource Management Programs" and an update to the "Human Resources and Administration Performance Expectations" memorandum, M&O contractors will be expected to adopt similar performance objectives.

What are the Sections of the Business Plan?

Business Description

The Business Description section of the Plan discusses the background and history of the training management activities within the Department. This section also discusses the responsibilities of the management team, the performance action task managers and contractors in supporting the performance objectives of the Plan. The corporate mission, vision, performance goal and performance objective are presented as stated in the Business Description. A brief summary of the other sections in the Plan is also presented in the Business Description.

Products/Services

The Plan focuses on those products and services that are corporate in nature, have cross-cutting applicability, and directly support the goals and performance objectives set by the Training and Development Management Council.

DOE's education, training and development organizations provide a wide variety of services to the DOE community. Some examples of the day-to-day operations include analyzing organizational and individual training needs, determining competency and skill gaps, developing organizational training and development budgets, identifying training courses, enrolling students in training activities, conducting classes, maintaining training records, evaluating contractor training programs, working with other Federal agencies, and administering career development programs and educational outreach activities.

Marketing/Communications

The Marketing/Communications section of the Plan provides an aggressive approach to communicating the benefits of this Plan to our customers. This approach identifies how to summarize and communicate messages inherent in utilizing a corporate approach to training. These messages include the ability to maximize resources, eliminate duplication of effort, enhance standardization/consistency, decrease redundancy, and improve performance, as well as market forecasting.

Constant and consistent communication of the benefits of using corporate training products and services is crucial. Champions and other "message carriers" must target potential pockets of resistance and work to reach a better understanding of the urgent precedence for this corporate approach. The plain and simple fact is that resources will continue to shrink as the Federal Government streamlines, and no single training budget is immune from this reality.

Financial Management

Funding for training activities within DOE is primarily decentralized. The most immediate and critical challenge for the Management Council is to determine the methods through which the corporate education, training and development services and products will be funded in the context of decentralized budgets. Therefore, the Financial Management section of the Plan varies from what is normally found in a business plan. Rather than balance sheets, this section discusses the funding responsibilities, implementation of the Plan, and anticipated value of the Plan.

What is the Prognosis for Success?

This Plan will succeed because the Secretary of Energy and the Management Council believe that this is the right direction for the Department of Energy. The driver behind DOE's Corporate Approach to Training is the need to coordinate training program management and centralize the development of Federal and contractor training programs that have cross-cutting applicability.

Therefore, it is imperative that the DOE training community works together to capitalize on its best resources in a corporate manner. A business risk involved with this centralized training approach is that training money/funding is more visible and, therefore, more vulnerable. Other risks include "customer" resistance to the corporate approach, perceived job threats, heightened congressional scrutiny, and a perceived large front-end investment.

It is important to the stakeholders that the return on investment (ROI) expected to be realized through implementation of this Plan is measured and communicated. ROI data is already available for some initiatives supported by the Plan:

- < Albuquerque Operations Office reports a training cost avoidance of \$101,067
- < The National Environmental Training Office (NETO) reports costs savings of \$1.7 million in course development and travel costs (See Appendix A)
- < The Safeguards and Security Central Training Academy (S&SCTA) reports cost savings of \$1.374 million due to presentation of training courses through their interactive television satellite system. (See Appendix B).

The performance objectives of the Corporate Education, Training and Development Plan are expected to be achieved over a three year period. Success will be achieved through a transition to a new way of doing business, by assuring the maturation of key business management processes to achieve corporate goals, and by addressing the critical training, education, and development needs of Department's workforce now and in the future.

Section I

BUSINESS DESCRIPTION

Business Description

INTRODUCTION

In Fiscal Year 1997, a transition was made from strategic alignment initiatives to a business-based definition of a training plan that will be used throughout DOE to guide and improve training activities. The Business Plan commits to Congress and other stakeholders that DOE will rebuild a talented and diverse workforce, improve and maintain workforce competence, while meeting its corporate training needs in a cost-effective and quality manner. The Plan is aligned with the DOE Strategic Plan, the Secretary's Workforce 21 Initiative, Executive Order 13111 "Using Technology to Improve Training Opportunities for Federal Employees," and incorporates GPRA-related performance measures. DOE's principal secretarial officers and the field office managers will be responsible and held accountable for implementation of the Plan.

HISTORY

Forty years ago the Government Employees Training Act (GETA) was passed into law. GETA created the framework for agencies to plan, develop, establish, implement, evaluate, and fund education, training and development programs designed to improve the quality and performance of the workforce. Throughout its 21-year history, the Department of Energy has provided training, education, and professional development services to thousands of employees and contractors. Much of this work was accomplished independently by each DOE Departmental element. As DOE's mission has changed, the nature of how the Department approaches training, education, and professional development has also changed. This Plan outlines how DOE, using a corporate approach, will face the education, training and development challenges toward the year 2000 and beyond.

DEPARTMENT OF ENERGY'S CORPORATE APPROACH TO TRAINING

The Department of Energy has moved from a decentralized approach to education, training and development activities to a corporate approach. The complexity, diversity, and decentralization of training activities has led to significant duplication of effort and loss of efficiency. It has also led to difficulties in analyzing and reporting consolidated information to accurately reflect the kinds, quantity, and quality of training across the complex. Increasingly, the Department is asked to respond to requests from Congress, the General Accounting Office, and other sources for specific training information for both Federal and contractor employees. The corporate approach calls for an alliance of training managers across the complex joining together to address training policy and practices while maintaining the autonomy of the day-to-day operations of the various training organizations.

The Department's work is accomplished through decentralized Federal and contractor organizations that reflect DOE's geographic and functional diversity. Consequently, training organizations reflect that decentralization and are designed to address the requirements of line management, employees, Congress, and taxpayers. As a result, the Department makes a substantial investment of both time and money to provide and maintain the specialized and technical skills necessary for its personnel to safely and effectively do their jobs.

The Department has undertaken a number of initiatives to define the methods, processes, and procedures to conduct training across the complex. The Department continues to promote a coalition of training offices across the complex that operates in an integrated manner and utilizes corporate training products and services. The champions for forging this alliance are the Training Development Management Council and the Training Development Coordinating Group.

MANAGEMENT TEAM

Training and Development Management Council

The Training and Development Management Council (The Management Council) is comprised of senior departmental managers chartered by the Secretary of Energy to oversee corporate policy, priorities, and direction for the Department's training community. Currently chaired by the Director of Management and Administration (MA-1) the Management Council is the equivalent of a company's Board of Directors. The Management Council acts on behalf of the Secretary of Energy, taking direction from and reporting to the Secretary through the Management Council Chairperson. The Director of Training and Human Resources Development serves as the Executive Secretary of the Management Council. The Management Council meets four times a year.

Training and Development Coordinating Group

The Training and Development Coordinating Group (The Coordinating Group) is the staff organization to the Management Council that coordinates education, training, and development activities conducted by Headquarters, field, and contractor organizations across the Department. Membership is drawn from the DOE Federal training and development community. The Chairman of the Coordinating Group is the Director of Training and Human Resources Development. The Coordinating Group provides recommendations to the Management Council for corporate direction and decisions. Its purpose is to foster, maintain, and make use of partnering relationships among Headquarters, field, and contractor organizations to achieve corporate education, training and development goals and objectives. The Coordinating Group participates in

monthly teleconferences to discuss relevant issues. Face-to-face meetings are held whenever needed to discuss, resolve, and take action on important issues.

ROLES AND RESPONSIBILITIES

Management Council

The Management Council determines the direction of the DOE Corporate Education, Training and Career Development Program and approves the performance objectives, measures and expectations outlined in the Training and Development Business Plan.

Members: Members of the Management Council determine the methods to commit resources through funding, staff, or both, for the completion of the performance actions outlined within the Plan.

Advisors: Advisors to the Management Council represent key Corporate Management areas i.e., Office of the Chief Financial Officer, Office of Economic Impact and Diversity, Office of Procurement and Assistance Management and the Office of the Chief Information Officer. Advisors review policy and program issues under consideration by the Management Council and provide guidance on potential impacts within their areas of responsibility.

Executive Secretary, Management Council

The Executive Secretary of the Management Council coordinates and provides oversight for the completion of the Performance Actions. The Executive Secretary recommends, to the Management Council, members of the Coordinating Group to serve as Task Managers to assure completion of individual Performance Action Sheets. The Executive Secretary reviews the progress of Plan implementation on a monthly basis and reports on Plan progress to the Management Council on a quarterly basis. Staff members from the Executive Secretary's office serve as liaisons to each Task Manager to facilitate task completion.

Coordinating Group

Coordinating Group members serve as Performance Action Task Managers or as members of teams formed to complete tasks.

Performance Action Task Managers

Task manager reviews the Performance Action sheet, develops a task implementation plan that includes a milestone chart with dates, description of subtasks and identifies the resources needed to complete the task. The task manager coordinates activities during the life of the task by assigning subtasks to team members. The Task Manager reports on the progress of the task to the Management Council's Executive Secretary.

Stilted

Performance Action Team Members

In addition to Coordinating Group members, Performance Action Team members may be other DOE Federal or contractor employees who can provide expertise in a particular

area. Team members complete subtasks outlined on the Performance Action Sheet as directed by the Task Manager.

Contractors

The Department will take necessary steps to ensure that the contractor community is pursuing performance objectives similar to those in this Plan. Specifically, by June 1999, a chapter will be added to DOE Order 350.1 “Contractor Human Resource Management Programs” that will assign responsibility and provide guidance for developing, monitoring, and evaluating education, training and development programs and activities.

Additionally, Performance Objectives and Measures Models, used to enhance oversight of business management activities under the Business Management Oversight Pilot (BMOP) Project, will be revised to address contractor training management. The performance objectives and measures models constitute all of the Human Resources policy and performance expectations for laboratories, non-laboratory contractors and Field Offices. These models represent competency-based practices that are measurable and in many cases, result in superior job performance within a defined job context.

The Models are used to set specific performance measures and expectations at the local level. The Office of Training and Human Resource Development will work closely with the Office of Contractor and Resource Management to provide business management oversight as local performance measures are established.

CORPORATE TRAINING AND DEVELOPMENT MISSION AND VISION

Mission

Adhering to the DOE Strategic Plan’s fundamental value that “employees are our most important resource,” DOE’s Corporate Training and Development Mission is to provide effective and quality education, training and development programs that enable all Federal and contractor personnel to safely and effectively perform those functions required to accomplish the DOE mission. It is the responsibility of heads of Departmental elements, line managers, supervisors, and individual employees to foster the intellectual capital of the Department by assuring that required competencies, knowledge, skills, and abilities are attained and enhanced.

Vision

The DOE corporate training function will be recognized as best-in-class among the Federal training organizations for developing high-quality employee performance. This

approach will result in cost-effective, standardized training that will nurture development and enhance employee performance, and will be sought after by all customers.

CORPORATE PERFORMANCE GOAL

The goal of DOE's corporate education, training and career development activities is to improve and maintain workforce competence of a talented, diverse workforce in an integrated, cost-effective and quality manner.

CORPORATE PERFORMANCE OBJECTIVES

A performance measurement model was used in the development of a strategy to support the goal. The performance objectives, measures and expectations that resulted from this exercise are shown on the following pages.

Performance Objectives	Performance Measures	Performance Expectations
1. Improve and maintain workforce competence.	1. Percentage of DOE elements that identify their critical training and development needs and a completed functional/ occupational needs assessment for the Department.	1. 100% of DOE elements identify their critical training and development needs by 12/31/99, and a functional/occupational needs assessment to determine program and organizational workforce training and development needs is completed by 12/31/99.
	2. Percentage of DOE Federal employees that have approved annual individual training and/or development plans.	2. 90% of Federal employees will have an approved annual individual training and/or development plan by 12/31/99.
	3. Percentage of Annual Training Plans submitted to the Office of Training and Human Resource Development (MA-31).	3. 100% of DOE elements will submit an Annual Training Plan to the Office of Training and Human Resource Development (MA-31) by _____.
	4. Commitments in Implementation plan 93-3 and Action items established by the Federal Technical Capability Panel (FTCP) that are completed in accordance with the directions of the FTCP chair.	4. All of the initial commitments of the 93-3 Implementation Plan are completed by the end of CY99.
	5. Management and supervisory training framework document.	5. A framework document for management and supervisory training will be completed by 05/03/99.
	6. Education, training and career development are integral elements of succession planning in DOE.	6. Address how education, training and career development are critical elements of and support overall succession planning.
2. Provide training, education, and career development services in a cost-effective manner.	1. DOE training costs benchmarked against industry/govt. training costs.	1. DOE's avg. training cost per employee is in alignment with similar federal agencies and the private sector by 12/31/99.
	2. Funds expended on DOE-developed training courses that are duplicative.	2. DOE does not fund development of duplicate training courses as of 12/31/99.

Performance Objectives	Performance Measures	Performance Expectations
	3. Number of Training Centers of Excellence.	3. 6 Training Centers of Excellence will be established by 12/31/00.
	4. Catalog of OJT training guides.	4. OJT guides are cataloged and made available to all Program Elements and Field Offices by 12/31/99.
	5. Number of career development-related details and rotational assignments.	5. A baseline is established and the process is understood by July of 1999.
	6. Assessment model for identifying training requirements during the directives process	6. Develop an assessment model to assess new DOE directives to determine training requirements and resulting resource impacts. Management Council identifies necessary resources when training requirements are established.
3. Establish a corporate training management system.	1. Implementation of the Corporate Human Resources Information System (CHRIS) Training Administration Module.	1. Complete an implementation plan, pilot the Training Administration Module and implement complex-wide by 10/01/99.
4. Partner with other Federal agencies, DOE contractors, State and local governments, academia and non-profit organizations to share resources and provide cross-cutting training in a cost-effective manner.	1. Amount of cost savings (or cost avoidance) attributed to training partnerships/training councils.	1. Cost savings (or cost avoidance) due to training partnerships and or participation in training councils increases by 25% by the end of FY00.
5. Optimize the use of technology-supported learning.	1. Technology Supported Learning Implementation Plan completed. 2. Pilot project completed.	1. TSL Implementation Plan is developed and produced by 03/31/99. 2. Pilot project demonstrating TSL-based training course completed by 1/31/99.

Performance Objectives	Performance Measures	Performance Expectations
6. Adopt and apply relevant and established corporate training standards, criteria, and metrics for consistent development, delivery, and evaluation of training.	1. DOE handbook on corporate training standards, criteria and metrics developed, approved and promulgated.	1. The Training and Development Coordinating Group (TDCG) meets, as needed, to review, revise, adopt and apply relevant and established corporate training standards, criteria and metrics. A DOE Handbook on corporate training standards, criteria and metrics is developed by 12/31/99.
	2. DOE Order 360.1a and DOE M 360.1a Federal Employee Training issued.	2. Complete revisions to and issue in final DOE Order and Manual 360.1a by 6/30/99. Issue appendix covering CHRIS Training Administration module by 11/30/99.
7. Reinvest savings achieved through the efficient operation of DOE's Corporate Education, Training and Development program.	1. Reinvestment Strategy document for cost-savings/cost avoidance achieved through training efficiencies.	1. Strategy for reinvestment will be developed, approved and promulgated by 12/31/99.

Performance Objectives	Performance Measures	Performance Expectations
8. Implement and evaluate the corporate education, training and development program.	1. Senior management evaluation of administrative support.	1. Administrative support to corporate education, training and development program activities is provided in a timely and effective manner.
	2. Annual evaluation report.	2. The effectiveness of the corporate education, training and development program will be evaluated on an annual basis and reported to the TDMC. The first report will be completed during the FY01 budget development cycle. The report will be used to support training budget requests.
	3. Completed survey report with results and recommendations.	3. Conduct a survey of customer satisfaction with the corporate education, training and development program by 12/31/00.
9. Implement steps to improve contractor employee training performance	1. Chapter on contractor training added to DOE Order 350.1 "Contractor Human Resource Management Programs" and promulgated	1. Issue new chapter to DOE Order 350.1 that covers contractor training performance by 6/30/99.
	2. Revised human resources performance objectives and measures model to include training performance objectives.	2. Revise the human resources performance objectives and measures model memorandum to include objectives related to contractor employee training performance by 6/30/99.

PRODUCT AND SERVICES

The Performance Measures outlined above describe the products and services that will be developed and institutionalized over the next three years. The corporate education, training and development products and services are presented in Section 2 of the Plan. In essence, the corporate products and services are the outcomes of the Performance Expectations.

MARKETING/COMMUNICATIONS PLAN

The Marketing/Communications strategy to be used to ensure Departmental awareness of methods that will result in cost controls and improved training is discussed in Section 3 of the Plan. This section discusses the methods that will be used to reach out to the target audience and convince them to support the corporate approach and its products and services.

FINANCIAL MANAGEMENT PLAN

The Financial Management Plan is discussed in Section 4 of the Plan. This Section discusses the responsibilities for funding the anticipated cost of implementing the Business Plan and explains how an Annual Implementation Plan will be used to determine and track the expected benefits and return on investment to investors and stakeholders (i.e., employees, management, Congress, and taxpayers).

Each principal secretarial officer in the Department will be responsible for the implementation of the Plan and will be held accountable for carrying out the actions in this Plan. The Financial Management Plan supports the anticipated costs for achieving the education, training and development performance expectations in FY99, 00, and 01.

Evaluation

The performance objectives, measures and expectations developed for the Business Plan have been cast into an overall balanced scorecard approach that will permit the Department to evaluate how effectively the program is implemented and institutionalized. The balanced scorecard is illustrated on the following page.

In addition, the Business Plan will also address those performance measures as outlined in the Human Resources Management and Accountability Program (HRMAP), the Business Management Oversight Program (BMOP), and will employ the Kirkpatrick model of training evaluation.

Balanced Score-Card Approach

ORGANIZATION		CUSTOMER	
1-1	Training Needs Assessments	3-1	CHRIS Training
1-2	Individual Training and/or Development Plans	6-1	Administration Module DOE Corporate handbook of Training Standards, Criteria and Metrics
1-3	Annual Training Plans	6-2	Revised DOE Order 360.1 and DOE Manual 360.1
1-4	Federal Technical Capability Program Support and Development	8-1	Administration of the Corporate Education, Training and Development Program
1-5	Management and Supervisory Training	8-2	Evaluation of the Corporate Education, Training and Development Program
2-1	Average Training Cost Per Employee	8-3	Customer Satisfaction
2-2	Duplicate Training Courses	9-1	New Chapter to DOE Order 350.1
		9-2	Contractor Training Performance Objectives and Measures
INTERNAL LEARNING AND GROWTH		PARTNERSHIPS	
2-4	On-the-job training Guides	2-3	Training Centers of Excellence
2-5	Career Development-related Details and Rotational Assignments	2-6	Unfunded Training Mandates
5-1	Technology-Supported Learning	4-1	Training Partnerships/Regional Training Councils
		7-1	Reinvestment Strategy

Section II

PRODUCTS and SERVICES

Products and Services

INTRODUCTION

A major part of DOE's Strategic Plan mission is "to support continued United States leadership in science and technology." One way the Department maintains its status as a "major partner in world class science and technology" is through its educational and information dissemination programs. The Department's corporate education, training and development mission is to ensure that quality education, training and development programs are designed to meet the skill mix needs to provide for a talented, diverse and high-quality workforce that "is recognized for business excellence, nurtures creativity, is trusted, and delivers results."

CORPORATE PRODUCTS AND SERVICES

This Plan follows a performance-based approach to focus on the **corporate product and services** that are under development, or planned for development, over the next three years. However, it is important to remember that each training organization is responsible for the day-to-day operations of the learning activities at their location. These tasks are many and varied. Without the dedication and professionalism that is evident in the performance of these services, there would be no effective education, training and development program in the Department.

The performance objectives outlined in Section 1 represent the high-level "services" that the Management Council has determined should be the focus of DOE's corporate education, training and development efforts. Within each objective, the Management Council has set a number of performance expectations to be achieved over the next three years. To reach these expectations, the training community will need to accomplish a series of tasks or performance actions. In turn, these actions will produce a number of products and services.

The remainder of Section II presents "product profiles" for each of the performance measures and expectations set by the Management Council. The profiles list the performance measures and expectations and the products or services that will be produced or offered. A Business Reason is identified for each product profile. The Business Reason explains why the Management Council believes the particular performance expectation is important to the corporate education, training and development program.

PERFORMANCE OBJECTIVE 1

Improve And Maintain Workforce Competence

Training Needs Assessments

Performance Measure 1-1

Percentage of DOE elements that identify their critical training and development needs.

A completed functional/ occupational needs assessment for the Department.

Performance Expectation 1-1

100% of DOE elements identify their critical training and development needs by 12/31/99.

A functional/occupational needs assessment to determine program and organizational workforce training and development needs is completed by 12/31/99.

Business Reason

Requirement under DOE Order 360.1 and noted as an area for improvement in the most recent GAO report on DOE's training program.

Product/Service

Guidance On Completing Element Training Needs Assessments

Functional/Occupational Needs Assessment Report for the Department

PERFORMANCE OBJECTIVE 1

Improve And Maintain Workforce Competence

Individual Training and/or Development Plans

Performance Measure 1-2

Percentage of DOE Federal employees that have approved annual individual training and/or development plans

Performance Expectation 1-2

90% of Federal employees will have an approved annual individual training and/or development plan by 12/31/99.

Business Reason

To improve and maintain workforce competence, line managers and supervisors need to determine the training needs of the employees under their responsibility. It is necessary for employees to have an approved annual individual training and/or development plan that indicates what training will be needed. Currently, it is not known how many employees have an approved annual individual training and/or development plans training plan. The first step is to establish a corporate baseline to assess the current status throughout DOE.

The second step, assuming the baseline reveals less than 90% compliance, is to analyze why employees do not have ***annual individual training and/or development plans*** and develop guidance to help line managers and supervisors achieve at least 90% compliance by 12/31/99.

Product/Service

Guidance On Annual Individual Training And/or Development Plans

PERFORMANCE OBJECTIVE 1
Improve And Maintain Workforce Competence

Annual Training Plans

Performance Measure 1-3

Percentage of Annual Training Plans submitted to the Office of Training and Human Resource Development (MA-31).

Performance Expectation 1-3

100% of DOE elements will submit an Annual Training Plan to the Office of Training and Human Resource Development (MA-31) by _____.

Business Reason

Requirement under DOE Order 360.1 and noted as a recommendation in the GAO report.

Product/Service

Sample format for Annual Training Plans

PERFORMANCE OBJECTIVE 1

Improve And Maintain Workforce Competence

Federal Technical Capability Program Support and Development

Performance Measure 1-4

Commitments in Implementation Plan 93-3 and Action items established by the Federal Technical Capability Panel (FTCP) that are completed in accordance with the directions of the FTCP chair.

Performance Expectation 1-4

All of the initial commitments of the 93-3 Implementation Plan are completed by the end of CY99.

Business Reason

Several commitments under the revised Implementation Plan are training-related and will involve training managers at defense nuclear facilities. These responsibilities center on qualifying applicable employees under the Technical Qualification Program and the standard for the Senior Technical Safety Manager (STSM). The revised Implementation Plan is the guiding document for achieving the performance expectation that all the initial commitments are completed by 12/31/99.

Product/Service

Updated Handbook entitled "Recruiting, Hiring, and Retaining High Quality Technical Staff; A Manager's Guide to Administrative Flexibilities.

Workshops to increase awareness of administrative flexibilities to line management

Revised Technical Qualifications Program

Revised Technical Leadership Development Program

Semi-annual Reports to the Defense Nuclear Facilities Safety Board

PERFORMANCE OBJECTIVE 1

Improve And Maintain Workforce Competence

Management and Supervisory Training

Performance Measure 1-5

Management and supervisory training framework document

Performance Expectation 1-5

A framework document for management and supervisory training will be completed by 05/03/99

Business Reason

The Training and Development Coordinating Group has identified the need to re-establish a requirement for training for new managers and supervisors. A framework document for management and supervisory training will be completed by 05/03/99.

Product/Service

Framework for conducting Department-wide management and supervisory training

PERFORMANCE OBJECTIVE 1

Improve And Maintain Workforce Competence

Succession Planning

Performance Measure 1-6

Education, training and career development are integral elements of succession planning in DOE.

Performance Expectation 1-6

Address how education, training and career development are critical elements of and supports overall succession planning.

Business Reason

Objective under Workforce 21.

Product/Service

Chapter in Succession Planning Management Plan/Guide on using training, education and career development to support succession planning

PERFORMANCE OBJECTIVE 2
Provide Training, Education, And Career Development Services
In A Cost-Effective Manner

Average Training Cost Per Employee

Performance Measure 2-1

DOE training costs benchmarked against industry/govt. training costs

Performance Expectation 2-1

DOE's average training cost per employee is in alignment with similar federal agencies and the private sector by 12/31/99

Business Reason

Past reports from the General Accounting Office (GAO) have indicated that DOE's average training cost per employee is not in alignment with federal and private industry counterparts. The Management Council agrees that this issue needs to be studied. The cost information gathered by GAO will be reviewed to determine a consistent method to calculate the current average cost. Average costs of other agencies and private companies, similar in mission, size and scope, will be reviewed. A comparative analysis will be conducted and, if necessary, guidance will be issued on methods to bring DOE costs in line with the other benchmarked agencies and companies. DOE's average training costs per employee will be in alignment with industry and similar government agencies by 12/31/99.

Product/Service

Comparative Analysis Of DOE Average Training Costs

PERFORMANCE OBJECTIVE 2
Provide Training, Education, And Career Development Services
In A Cost-Effective Manner

Duplicate Training Courses

Performance Measure 2-2

Funds expended on DOE-developed training courses that are duplicative

Performance Expectation 2-2

DOE does not fund development of duplicate training courses as of 12/31/99

Business Reason

The decentralized nature of DOE's training operations has led to the development of duplicate training courses. The magnitude of the problem is unknown. The first step is to establish a baseline of duplicate training courses, developed and funded by DOE. The second step is to develop a system to prevent duplicate development of Federally funded training courses. An integral part of this system will be Training Centers of Excellence that will reduce duplicative design, development and delivery of training in specific topical areas. The goal is that by 12/31/99 the Department will no longer fund the development of duplicate training courses.

Product/Service

Baseline Of Duplicate Training Courses, Developed And Funded By DOE and Guidance On Tracking Development Of DOE-funded Training Courses.

PERFORMANCE OBJECTIVE 2
Provide Training, Education, And Career Development Services
In A Cost-Effective Manner

Training Centers of Excellence

Performance Measure 2-3

Number of Training Centers of Excellence

Performance Expectation 2-3

6 Training Centers of Excellence will be established by 12/31/00

Business Reason

The Training Centers of Excellence Program was successfully launched in December 1997 with the designation of two Training Centers of Excellence. Expansion of the program calls for the formation of a panel of training and subject matter experts to manage the application and review process, recommendation of topical areas for COE designation, development of general operating principles and evaluation of operating COEs. (See CTA and NETO cost savings/cost avoidance information in the Appendices). Six Training Centers of Excellence will be established by 12/31/00.

Product/Service

Training Centers Of Excellence Review Panel Established

Designation Of Six Training Centers Of Excellence

Training Center of Excellence Operating Philosophy, Principles and Practices

PERFORMANCE OBJECTIVE 2
Provide Training, Education, And Career Development Services
In A Cost-Effective Manner

On-The-Job Training Guides

Performance Measure 2-4

Catalog of On-the-job Training (OJT) Guides

Performance Expectation 2-4

OJT guides are cataloged and made available to all Program Elements and Field Offices by 12/31/99

Business Reason

On-the-job Training (OJT) Guides are considered a cost-effective method of providing training for many tasks performed across DOE. The number of OJT Guides and related-subjects available in DOE is unknown. A data call will be conducted and a catalog will be produced and made available to Departmental training offices by 12/31/99.

Product/Service

Catalog Of On-The-Job Training (OJT) Guides

PERFORMANCE OBJECTIVE 2
Provide Training, Education, And Career Development Services
In A Cost-Effective Manner

Career Development-Related Details and Rotational Assignments

Performance Measure 2-5

Number of Career Development-related Details and Rotational Assignments

Performance Expectation 2-5

Establish baseline and understand the process by July of 1999

Business Reason

Employee details and rotational assignments for career development purposes are also considered a cost-effective, mutually beneficial method of training employees. To determine if details are being utilized, the first step is to establish a baseline. Guidance will be developed and made available on using career-development details and rotational assignments as a means of training. Increase usage of career development-related details and rotational assignments as a means of providing training by 25% by 12/31/01.

Product/Service

Guidance On Using Career-Development Details And Rotational Assignments (As A Means Of Training)

PERFORMANCE OBJECTIVE 2
Provide Training, Education, And Career Development Services
In A Cost-Effective Manner

Unfunded Training Mandates

Performance Measure 2-6

Assessment Model for Directives Process

Performance Expectation 2-6

Develop an assessment model to assess new DOE directives to determine training requirements and resulting resource impacts. Management Council identifies necessary resources when training requirements are established.

Business Reason

When training mandates are issued, the impact upon training budgets is often not considered. Training managers must often use existing resources to fulfill the training mandate. This may result in the elimination of other planned education, training and development activities. There is a need for a formal assessment of training requirements to be conducted as part of the new directives review process. This will identify impacts to training and development budgets before such requirements are enacted. In addition, the Management Council will address the challenges of identifying the resources for unplanned training mandates whenever such DOE directives or other Federal requirements are issued. This may include seeking additional funding.

Product/Service

Assessment model for assessing new DOE directives for training requirements

PERFORMANCE OBJECTIVE 3

Establish A Corporate Training Management System

CHRIS Training Administration Module

Performance Measure 3-1

Implementation of the Corporate Human Resources Information System (CHRIS) Training Administration Module.

Performance Expectation 3-1

Complete an implementation plan, pilot the Training Administration Module and implement complex-wide by 10/01/99.

Business Reason

This is a critical corporate training initiative. A CHRIS Training Administration Module project plan has been developed. The next step is to develop an implementation plan with milestones and deliverables. The project will continue to receive a high-level of attention from the Management Council. Implementation Plan, pilot site testing and full implementation will be completed by 10/01/99.

Product/Service

Implementation Plan For The Corporate Human Resources Information System Training Administration Module, Operate Module At A Pilot Site, Bring All DOE Elements Online

PERFORMANCE OBJECTIVE 4
Partner With Other Federal Agencies, State And Local Governments,
Academia, And Industry To Share Resources And Provide Cross-
Cutting Training In A Cost-Effective Manner

Training Partnerships/Regional Training Councils

Performance Measure 4-1

Amount of cost savings (or cost avoidance) attributed to training partnerships/training councils.

Performance Expectation 4-1

Cost savings (or cost avoidance) due to training partnerships and/or participation in training councils increases by 25% by the end of FY00.

Business Reason

Training partnerships within DOE and with other parties such as academia, State and local governments, and non-profit organizations can be mutually beneficial and cost-effective. There is anecdotal evidence of effective partnerships across DOE. Information on existing partnerships will be gathered and cost savings/cost avoidance information compiled and shared with DOE training offices and appropriate congressional offices. Several DOE training offices participate on regional training councils with other federal agencies. The councils are a cost-effective means of sharing cross-cutting training with other federal employees (See FIATC example in Appendices). Information on existing councils will be gathered and cost savings/cost avoidance information compiled and shared with other DOE training offices. A guidance document on forming training partnerships and training councils, including lessons learned, and calculating cost savings/cost avoidance as a result of regional councils will be developed and made available to interested parties.

Product/Service

Guidance Document On Forming Training Partnerships and Training Councils, Including Lessons Learned, And How To Calculate Cost Savings/Cost Avoidance As A Result Of Partnerships and Council Membership

PERFORMANCE OBJECTIVE 5

Optimize The Use Of Technology-Supported Learning (TSL)

Technology-Supported Learning Program

Performance Measure 5-1

Technology-Supported Learning Implementation Plan completed and TSL Pilot Project completed.

Performance Expectation 5-1

*TSL Implementation Plan is developed and produced by 03/31/99.
Pilot projects demonstrating TSL-based training course completed by 12/31/99.*

Business Reason

The Department is in the process of implementing a technology-supported learning program. To date, a business case and project plan have been developed. The next step is to develop the implementation plan. The vision of this program is to meet learning needs of the Department through a mix of traditional instructional methods and the use of compatible technology-supported learning tools, (interactive-television, computer-based training, and Internet, WEB-based training). An implementation plan will be completed by 03/31/99. Pilot projects demonstrating a TSL-based training course will be produced by 12/31/99.

Product/Service

*Implementation Plan For Technology-Supported Learning (TSL)
Pilot projects demonstrating TSL-based training course*

PERFORMANCE OBJECTIVE 6
Adopt And Apply Relevant And Established Corporate Training
Standards, Criteria, And Metrics For Consistent Development, Delivery,
And Evaluation Of Training

DOE Corporate Handbook of Training Standards, Criteria and Metrics

Performance Measure 6-1

DOE Handbook on corporate training standards, criteria and metrics developed, approved and promulgated.

Performance Expectation 6-1

The Training and Development Coordinating Group (TDCG) meets, as needed, to review, revise, adopt and apply relevant and established corporate training standards, criteria and metrics.

DOE Handbook on corporate training standards, criteria and metrics developed by 12/31/99.

Business Reason

A corporate approach to training calls for consistency in how the Department conducts business. The TDCG will research, review and endorse training standards, criteria and metrics to be used throughout DOE for the consistent development, delivery and evaluation of training. A DOE Handbook on recommended training standards, criteria and metrics will be developed and promulgated by 12/31/99.

Product/Service

DOE Handbook on corporate training standards, criteria and metrics

PERFORMANCE OBJECTIVE 6
Adopt And Apply Relevant And Established Corporate Training
Standards, Criteria, And Metrics For Consistent Development, Delivery,
And Evaluation Of Training

Revised DOE Order 360.1 and DOE Manual 360.1

Performance Measure 6-2

DOE Order 360.1a and DOE Manual 360.1a Federal Employee Training issued.

Performance Expectation 6-2

*Complete revisions to and issue in final DOE Order and Manual 360.1a by 6/30/99.
Issue appendix covering CHRIS Training Administration Module by 11/30/99.*

Business Reason

A working group was established and prepared a draft revised Order (DOE O 360.1A) and corresponding Manual (DOE M 360.1A). The documents will be forwarded to the Directives Management Team for processing and Department-wide comment. After the comments have been resolved the documents will be formally issued. Planned time frame for issuing the documents is by 01/31/99. An appendix with policy and guidance covering CHRIS Training Administration Module will be issued by 11/30/99.

Product/Service

DOE Order 360.1a and DOE Manual 360.1a

PERFORMANCE OBJECTIVE 7
Reinvest Savings Achieved Through The Efficient Operation Of DOE's
Corporate Education, Training And Development Program

Reinvestment Strategy

Performance Measure 7-1

Reinvestment Strategy document for cost-savings/cost avoidance achieved through training efficiencies.

Performance Expectation 7-1

Strategy for reinvestment will be developed, approved and promulgated by 12/31/99.

Business Reason

Under the Executive Order entitled "Using Technology to Improve Training Opportunities for Federal Government Employees," Section 3, Duties of All Federal Agencies, (b) states - "Each Federal agency, to the extent permitted by law, is encouraged to consider how savings achieved through the efficient use of training technology can be reinvested in improved training for their employees."

Product/Service

Reinvestment Strategy document

PERFORMANCE OBJECTIVE 8
Implement And Evaluate The Corporate Education, Training And Development Program

Administration of the Corporate Education, Training and Development Program

Performance Measure 8-1

Senior management evaluation of administrative support.

Performance Expectation 8-1

Administrative support to the corporate education, training and development program is provided in a timely and effective manner.

Business Reason

Administration of the corporate education, training and development program requires dedicated staff and resources to carry out the Performance Goal and Objectives as identified in the Business Plan.

Product/Service

Enhanced/Strengthened corporate approach to training as evidenced by achievement of milestones in the Business Plan Annual Implementation Plan

PERFORMANCE OBJECTIVE 8
Implement And Evaluate The Corporate Education, Training And Development Program

Evaluation of the Corporate Education, Training and Development Program

Performance Measure 8-2

Annual Evaluation Report.

Performance Expectation 8-2

The effectiveness of the corporate education, training and development program will be evaluated on an annual basis with results of the evaluation reported to the Management Council. The first report will be completed during the FY01 budget development cycle. The report will be used to support training budget requests.

Business Reason

Evaluation of the corporate education, training and development program is necessary to determine if the investment in the program is yielding the desired results. The evaluation will focus on the progress made on reaching the performance expectations outlined in the Training and Development Business Plan.

Product/Service

Evaluation report in support of the corporate education, training and career development program

PERFORMANCE OBJECTIVE 8

Implement And Evaluate The Corporate Education, Training And Development Program

Customer Satisfaction

Performance Measure 8-3

Completed customer/stakeholder survey report (w/ results and recommendations) by 12/31/00.

Performance Expectation 8-3

Conduct a survey of customer/stakeholder satisfaction with the corporate education, training and development program.

Business Reason

An important element in determining the ultimate success of the corporate education, training and development program is customer and stakeholder satisfaction. There are many potential customers and stakeholders of this program. A survey to measure their satisfaction with education, training and development services should be developed and conducted. The results will provide valuable information that can be used to determine the future direction of the corporate education, training and development program.

Product/Service

Survey report

PERFORMANCE OBJECTIVE 9
Implement Steps To Improve
Contractor Employee Training Performance

New Chapter to DOE Order 350.1
Contractor Human Resource Management Programs

Performance Measure 9-1

Chapter on contractor training added to DOE Order 350.1 "Contractor Human Resource Management Programs" and promulgated.

Performance Expectation 9-1

Issue new chapter to DOE Order 350.1 that covers contractor training performance by 6/30/99.

Business Reason

In response to the GAO recommendations report, the Department recognizes that improvements need to be made in the area of oversight of contractor employee training performance. One of the steps the Department is taking is to strengthen the requirements under DOE Order 350.1 "Contractor Human Resource Management Programs."

Product/Service

New chapter to DOE Order 350.1 "Contractor Human Resource Management Programs"

PERFORMANCE OBJECTIVE 9

Implement Steps To Improve Contractor Employee Training Performance

Contractor Training Performance Objectives and Measures

Performance Measure 9-2

Revised human resources performance objectives and measures model to include training performance objectives.

Performance Expectation 9-2

Revise the human resources performance objectives and measures model memorandum to include objectives related to contractor employee training performance by 6/30/99.

Business Reason

In response to the GAO recommendations report, the Department recognizes that improvements need to be made in the area of oversight of contractor employee training performance. In addition to strengthening the requirements under DOE Order 350.1 "Contractor Human Resource Management Programs" as outlined in Performance Measure/Expectation 9-1, the Department will issue a memorandum from the Director of Management and Administration identifying those human resource performance objectives and measures to be used by laboratory and non-laboratory contractors. These general performance objectives are used by contracting officers and contracting officer representatives to negotiate specific performance measures for individual contracts.

Product/Service

Updated Performance Objectives and Measures Model Memorandum

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Section III

MARKETING and

COMMUNICATIONS PLAN

Marketing/Communications Plan

Why a Marketing/Communications Plan?

DOE is firmly committed to moving toward corporate training products and services to meet its goal of operating in a corporate manner in conducting its training business. However, these corporate products and services must be fully utilized if the Department is to meet this goal. This will only be successfully accomplished if the DOE training community and its customers – DOE employees and contractors – are aware of these products and services and understand the benefits of using them. This marketing/communications plan provides a basic strategy and action plan for:

Who needs to be informed? – The target audience

What will they need to know? – The message

How will they be informed? – The media or method

When will they be informed? – The schedule

Who will be responsible for implementing this Plan? – Marketing Group

What will the future hold? – Marketing Forecast

Who is the Target Audience for these Corporate Training Products and Services?

The target audience for DOE's corporate training products and services includes:

Top-Level Management

Includes Principal Secretarial Officers, Field Office Managers, the Chief Financial Officer, the Office of Procurement and Assistance Management, and other senior management who stand to benefit from increased quality and consistency, and cost-effectiveness of their education, training and development programs.

Line Managers and Supervisors

Line Managers and Supervisors who will benefit from having information on corporate education, training and development products and services when assessing employee education, training and development needs and requirements.

Training Managers

Training Office managers and support staff in the DOE training community who have responsibility for assuring that DOE's training products and services are high quality, consistent, effective, and cost-efficient across the DOE complex.

DOE Employees and Contractors

DOE trainees who will benefit from improved quality, accessibility, reciprocity, and cost-effectiveness of training to improve job performance, meet TQP requirements, enhance career and professional development, and to respond to a changing mission.

Key DOE Stakeholders

Congress, who is continuing to focus on the Department's training costs, and the Defense Nuclear Facilities Safety Board, whose focus on Federal workforce technical training and qualifications is a principal driver affecting training goals. Taxpayers, who ultimately pay for the education, training and development activities.

What Will the Target Audience Need to Know? – The Message

There are two fundamental actions to address in developing the marketing message for DOE's corporate training products and services:

- C Define Unique Product Advantages
- C Capture Customer Mindset

The overall marketing message will be based on the completion of these actions.

Defining Unique Product Advantages

The overall advantages of DOE's corporate training products and services include the ability to maximize resources, enhance standardization/consistency, decrease redundancy, better respond to congressional concerns, improve performance, elevate the training community's ability to meet goals, promote just-in-time training and cost efficiencies, and support metrics.

In terms of product strength, DOE's corporate training products and services have several distinct advantages. First is the marked advancement in providing a framework for fostering a cooperative and coordinated effort for enhancing the competence of the DOE workforce. This framework is consistent with modern management practices described in DOE's Strategic Plan. These practices recognize that the greatest benefits accrue when all parties are in agreement with and support policy and procedures. This corporate approach, shared by Headquarters, field, and contractor organizations in the broad DOE family, is a partial answer to the trend toward shrinking resources (dollars and people).

Secondly, DOE corporate training products and services have the potential to significantly improve the quality of DOE training. This potential can be realized in several ways. DOE corporate training products and services will:

- C Ensure that employees have an approved annual individual training and/or development plan and that mandatory training requirements are met on a timely basis.
- C Assist the Department in maintaining technical competence in the workforce through the Technical Qualification Program and the Senior Technical Safety Manager program.
- C Provide managers and supervisors with training to help them effectively carry out their managerial responsibilities.
- C Provide education, training and development activities in a cost-effective manner through programs such as the Training Centers of Excellence, career development details and rotational assignments, and a clearinghouse for the development of new training courses.
- C Establish a corporate training management system that will be used complex-wide.
- C Encourage training partnerships and active participation in federal regional training councils.
- C Optimize the use of technology-supported learning
- C Identify corporate training standards, criteria and metrics for the consistent development, delivery and evaluation of training.
- C Support educational outreach programs to elementary, high school and college students.

Capturing Customer Mindset

Next, it is essential to capture the customer mindset. Because the corporate approach to training is in essence a partnering relationship, its ultimate success hinges on overcoming the parochial mindset so prevalent throughout the DOE complex. This means recognizing a “healthy dose” of customer skepticism, even within the training community; recognizing that customers are not always aware of key drivers (Congressional pressure, GPRA, DOE Strategic Plan, Secretary’s Performance Agreement with the President); and recognizing the natural inclination for Headquarters, field, and contractor organizations to persist in the “what’s in it for me” and “we’re unique” syndrome of thinking. The “we’re unique” syndrome creates a perceived need for customization of training as opposed to standardization and consistency. In addition, competing priorities within the various organizations make it difficult for individuals to think corporately.

Recognizing this customer mindset will be of critical importance in developing the overall marketing message. If the marketing message can touch this collective resistant “nerve,” it can go a long way toward helping DOE meet its corporate training goals.

How Do We Market/Communicate DOE’s Corporate Training Products and Services? – *The Media or Method*

Securing Senior Management Support for Corporate Products and Services

Gaining the support of the Department’s senior management is crucial to successfully implementing the Corporate Approach to Training across the DOE complex. Their support will be the means for a “cascading” acceptance and understanding of the precedence and urgency for corporate training products and services as the way of doing business. Recognizing that this level of management is dealing with numerous Department-wide issues, it is imperative that the corporate training approach message hit succinctly on the issues of most importance – quality, effectiveness, and cost-efficiency, and managing dwindling resources. The way to solicit senior management support is to demonstrate the overall strengths and advantages of corporate training products and services as they relate to these key issues.

Message to Senior Management

- C The Department faces continuing congressional pressure for increased accountability of its education, training and career development activities. In addition, the GPRA, DOE Strategic Plan, and Secretary’s Performance Agreement with the President are drivers impacting how DOE conducts training activities.
- C The Corporate Approach to Training (using corporate training products and services) will maximize resources, eliminate duplication of effort, reduce redundancy, and promote standardization and consistency in DOE’s training, education, and development activities.
- C The corporate training products and services focus on technology-supported learning is directly linked to the President’s commitment to technology and education outreach as described in his memo of January 30, 1998.

Distribution Channel

- C Message will be carried by Corporate Training Approach Champion (Director of Training and Development) as the top manager for the corporate approach to training, directly to the Assistant Secretaries, Field Office Managers, Chief Financial Officer, and other appropriate senior managers.

Method of Delivering Message

- C The Management Council will provide copies of the Plan to senior managers as a read-ahead document.
- C The Director of Training and Development will make personal visits to senior managers to discuss the key drivers and benefits of successful implementation of the Corporate Approach to Training.
- C Appropriate members of the Coordinating Group will follow-up the Champion's one-on-one meetings with additional information and updates on progress and issues.

Informing Training Managers and the Training Community – Building Local Champions

Gaining the support of the Department's training managers and training community is the second step in delivering the marketing/communications message. These individuals will be the local champions for the Corporate Approach to Training and the key points-of-contact for DOE's corporate training products and services. Many of these individuals are already acting in this capacity through their active involvement in the Coordinating Group. Reaching the rest of this community – the training managers and support staffs at both DOE and its contractors' training offices – will be achieved through workshops, focus groups, and aggressive networking. These types of forums will provide the opportunity for team-building, detailed focus sessions on each aspect of the corporate products and services (i.e., CHRIS briefings/updates; COE focus sessions, etc.), and direct access to the appropriate team leaders and managers at the forefront of the corporate products and services. In-depth understanding of the benefits of the corporate training products and services will build a crucial network of local champions for the Corporate Approach to Training.

Message to Training Managers and the Training Community

- C The Corporate Approach to Training (using corporate training products and services) will maximize resources, reduce redundancy, and promote standardization and consistency in DOE's training, education, and development activities.
- C Training resources will continue to be extremely vulnerable; utilizing corporate training products and services can minimize the impact of shrinking resources.

Distribution Channel

- C Message will be carried by the Director of Training and Development, corporate training products and services team leaders, and Training Center of Excellence

directors to DOE training managers, Coordinating Group members, the Federal Technical Capabilities Panel, the Energy Facility Contractors Group (EFCOG), and the Training, Resource and Data Exchange (TRADE) organization.

Method of Delivering Message

- C The Management Council will provide copies of the Plan to training managers at both DOE offices and to the DOE contractor community through the Energy Facility Contractors Group (EFCOG) and the TRADE organization.
- C Message will be carried through Coordinating Group meetings, Technical Personnel Coordination Committee teleconferences, monthly training community calls, training coordinators meetings, and forums such as workshops and focus groups that deal with corporate training products and services. Corporate training products and services Team Leaders will organize and sponsor these forums at the direction of the Director of Training and Development, and will coordinate with designated points-of-contact throughout the DOE training community.
- C Message will also be delivered through ongoing networking among the DOE training community (informal meetings, phone conferences, TRADE organization activities, etc.)

Informing Line Managers and Supervisors – Building Front Line Support

Line Managers and Supervisors are important partners and customers of the corporate approach to training. Line Managers and Supervisors are responsible for developing and approving their employee's individual development plans. They also have approval authority on employee training requests. Line Managers and Supervisors can ensure that the corporate products and services are utilized. The challenge is to demonstrate that use of corporate products and services will maximize the return on investment of their training dollars while providing quality education, training and development services to their employees.

Message to Line Managers and Supervisors

- C Although training resources are shrinking, corporate products and services are in place to maximize return on investment.
- C Through the corporate approach, local training offices are ready to assist managers and supervisors in meeting their expectations and their employees' education, training and development needs.

Distribution Channel

- < Heads of Program Elements and Field Offices will deliver the message to their line managers and supervisors.
- < Local training managers and training staff will take the corporate message add any local elements and deliver it to line managers and supervisors.
- < Training Centers of Excellence will be responsible for promoting their services to the applicable line managers and supervisors.

Method of Delivering Message

- C The Plan will be made available on the Clearinghouse for Training, Education and Development homepage on the Internet.
- < Briefings that can be delivered to line managers and supervisors will be made available to heads of Program Elements and Field Office Managers.
- < Local training offices will promote the corporate approach to line managers and supervisors at Program Office and/or Field Office meetings, conferences and events.

Informing DOE Employees and Contractors – Building Customers

To successfully build a customer base, the general population of DOE employees and contractors must be fully informed of the availability and advantages of DOE's corporate training products and services. In meeting their training requirements and professional development needs, the average DOE employee will act upon the training information most readily available.

"What they don't know" can greatly impact the utilization of corporate training products and services. If "Joe or Jane Engineer" does not know that he/she can enroll in a DOE-tailored environmental monitoring course at the National Environmental Training Office and receive more applicable training at a lower in-house cost, then he/she will attempt to register for a commercially available course at a higher cost. This can result simply because he/she has the flyer in hand with the detailed information.

Ensuring awareness of corporate training products and services throughout the DOE complex will require an ongoing distribution of information that reaches throughout the DOE organization. This can best be achieved by a multimedia communications approach to increase the chances of reaching the greatest possible number of DOE customers.

Message to DOE Employees and Contractors

- C Use DOE corporate training products and services. These products and services will provide employees and contractors with improved quality, applicability, accessibility, reciprocity, and affordability of training to meet TQP requirements, enhance career and professional development, improve performance, and respond to a changing mission.

Distribution Channel

- C Message will be delivered by local champions – all supervisors and managers, training managers, and training community.
- C “Direct marketing” – message will be delivered direct to employees through multimedia as described below.
- C Individual Training Centers of Excellence (COE) will be key message carriers by promoting and advertising their own corporate training products and services. The Management Council and The Coordinating Group will support the COE's through endorsement and sharing of COE materials throughout the training community. COE's will also form an informal network through which they support each other by sharing information and directing customer calls to the most appropriate COE for the desired product or service.

Method of Delivering Message

Message will be delivered through multiple media and communications channels:

- C Enhance/improve current training advertising/communication methods such as the Clearinghouse for Training, Education and Development; LAN/DOECAST; TRADE Bulletins, etc.
- C Develop, publish, and deliver brochures, flyers, bulletins, and other print media containing basic information on corporate training products and services.
- C Publish/broadcast corporate products and services success stories (especially those that include specific metrics/cost savings) using print and electronic distribution methods.
- C Conduct briefings on the benefits of corporate training products and services during general DOE all-hands meetings, conferences, and other forums with a large “captured” audience.

- C Conduct a specialized broadcast (i.e., from Central Training Academy) promoting the benefits of corporate training products and services.
- C Conduct customer service representative courtesy calls.
- C Sponsor a complex-wide “DOE Corporate Training Week.” This action would demonstrate visible Secretary support via presentations, announcements, banners on buildings, handouts, buttons and other promotional items, and lobby displays/exhibits.
- C Participate in technical and professional conferences (i.e., Environmental Safety & Health, Nuclear Society, etc.) via booths/displays and personal representatives of corporate training products and services (i.e., COE staff, etc.).
- C Ongoing networking among the DOE employees and contractors (i.e., inter/intra office communication).

Informing Key DOE Stakeholders – Building External Support

External support of DOE’s corporate training products and services can be the linchpin for the Department’s efforts and the key to stabilizing and improving future training resources. Congress and the Defense Nuclear Facilities Safety Board (DNFSB) are closely watching DOE’s efforts in this area. Recent General Accounting Office audits focused on earlier lack of progress in meeting corporate training goals. The release of the Plan signals to internal and external stakeholders DOE’s commitment to successfully launching corporate training products and services as the standard way of doing business. To ensure critical future support of DOE training activities, external stakeholders must be kept informed of progress made in this effort.

Message to Key DOE Stakeholders

- C DOE is serious about its Corporate Approach to Training, and is demonstrating this by launching key corporate training products and services that will maximize resources, eliminate duplication of effort, reduce redundancy, and promote standardization and consistency in DOE’s training, education, and development activities.

Distribution Channel

- C Message will be delivered by the Management Council Chairperson, members of the Management Council and the Corporate Approach to Training Champion to Congressional and DNFSB representatives.

Method of Delivering Message

- C Message will be delivered through one-on-one meetings, subcommittee briefings, and other senior management communication forums.

Who is Responsible for Overseeing the Implementation of this Marketing/Communications Plan?

The Coordinating Group chairperson will establish a working group to take the lead for implementing this marketing/communications plan. This corporate products and services Marketing Group will develop specific action plans and schedules, and designate responsible individuals throughout the DOE complex in a team approach to “getting the word out.” Short-term decisions include:

- C Develop an action plan and identify the required resources for implementing the Marketing Plan.
- C Assign specific responsibilities for implementing the Marketing Plan.
- C Establish short-term evaluation points to assess any necessary adjustments to the plan and to capitalize on new complementary initiatives in the pipeline.
- C Determine how to measure the success of the Marketing Plan.

When Will this Marketing/Communications Plan be Implemented? – *Schedule*

The publication of the Plan marks the Management Council's endorsement of the full implementation of corporate training products and services as DOE's way of conducting its training business. Establishment of a Coordinating Group Marketing Team will occur after promulgation of the Business Plan. Implementation of the marketing/communication plan actions will occur in throughout 1999. The first evaluation point for the marketing plan will occur in the early Fall of 2000.

What Will the Future Hold? – *Marketing Forecast*

The stability of the training, education, and professional development market is vulnerable. This is based on budget direction as determined by Congressional appropriation of funds. Meanwhile, embarking on an aggressive effort to pool resources is the best defense.

Return-On-Investment Potential

The potential for the successful implementation of corporate training products and services within the Department over the next several years includes opportunities to:

- C Make better use of technical capabilities and enhance existing capabilities;
- C Market/get the word out on existing resources (subject matter experts, facilitators, and programs);
- C Set precedence for designating additional training Centers of Excellence;
- C Set precedence for increasing partnering ventures with interagency (Federal, State, and local) councils, DOE contractors, and DOE unions; and
- C Set precedence for increased education outreach initiatives.

Out-year opportunities include writing training contracts that incorporate a consistent framework for training performance, reaching greater numbers of customers through maximizing resources and technology, and providing management with better information and support on defining the Department's training needs and return-on-investment. Another opportunity for development includes the additional use of in-house subject matter experts.

Business Risks

A goal of the DOE's Corporate Approach to Training is to coordinate training program management and centralize the development of Federal and contractor training programs that have cross-cutting applicability. One business risk involved with this centralized training approach is that training money/funding is more visible and, therefore, more vulnerable. Other risks include "customer" resistance to the corporate approach, perceived job threats, heightened congressional scrutiny, and a perceived large front-end investment.

The best investment to address these business risks is consistent and ongoing marketing and communications of the benefits of using corporate training products and services. Champions and other message carriers must target potential pockets of resistance and work to reach a better understanding of the urgent precedence for this corporate approach. The plain and simple fact is that resources will continue to shrink as the Federal Government streamlines, and no single training budget is immune from this reality. Therefore, it is imperative that the DOE training community pulls together to capitalize on its best resources in a corporate manner.

Section IV

FINANCIAL MANAGEMENT PLAN

Financial Management Plan

INTRODUCTION

It is critical that a Business Plan communicate to its “investors/shareholders” the anticipated cost of implementing the Corporate Education, Training and Development Business Plan for the Department of Energy. The Financial Management Plan must communicate the anticipated cost of implementing the Business Plan as well as the expected benefits and return on investment to our “investors/stakeholders” who are employees, management, Congress, and United States taxpayers.

This Financial Management section varies from what is normally found in a business plan. This section concentrates on funding issues, implementation of the Business Plan and evaluation/return on investment, rather than balance sheets.

The Management Council believes that continued implementation of this plan will result in a more unified approach to training employees, improved management of education, training and developmental activities across the Department and the delivery of a more efficient and cost-effective training, education and development program, addressing the issues presented in the General Accounting Office (GAO) reports. To attain these results, it is vital to relate training to workforce competence and performance and to consider the return on investment in the decision-making process. Through the implementation of this corporate plan, the Department expects to continue and institutionalize efforts to eliminate redundancy, reduce training related costs (e.g., travel and time in training), utilize technology-supported learning, maximize student/instructor ratios, partner to share resources, consider outsourcing when appropriate, while increasing the quality of the program.

CURRENT OPERATING ENVIRONMENT

The Department of Energy is facing a number of serious workforce issues as a result of downsizing, retirements, and hiring moratoriums. In addition, the aging of the DOE workforce and the impending loss of critical skills is a crucial factor in the need to establish workforce plans to address (1) mission needs, (2) succession planning, (3) technical competence, and (4) the ability to attract and retain a talented, versatile and diverse workforce. This operating environment demands that management focus on the education, training and development of the DOE workforce both Federal and contractor.

Over the past four years, the Department of Energy has experienced major reductions in its overall operating budgets for education, training and development activities. This was the direct result of Congressional criticism, major cuts in DOE program direction budget line items, and actions taken to reduce Federal and contractor training costs. In reports to the GAO, the Department has reported dramatically reduced overall

training costs. However, the continued reduction of training costs may not be possible as serious workforce education, training and development demands are being made known. In addition, the staff resources of the DOE Training and Development community has been significantly reduced as a result of downsizing efforts and planned retirements. It is within this environment that the Corporate Education, Training and Development Business Plan will be implemented.

RESPONSIBILITIES FOR FUNDING THE BUSINESS PLAN

The Management Council, acting on behalf of the Secretary of Energy, will address critical financial management issues that are organizational; the most challenging and urgent being the various sources of financing this plan. The Management Council recognizes that joining forces for collaborative work is essential, especially in the context of shrinking budgets and the decentralization of training dollars in the Department. In order for this type of shared resource alliance to work consistently, the participating elements must build a high level of trust in each other. Operating under compatible goals and common values will make this easier.

The Chief Financial Officer (CFO) as Advisor to the Management Council, will provide advice, guidance and assistance in determining the appropriate methods and financial management mechanisms to adequately provide for the necessary resources to carry out this Plan.

The Director of Procurement and Assistance, as Advisor to the Management Council, will provide advice, guidance and assistance in ensuring contractor performance with regard to the Department's Human Resources and Administration performance expectations, as well as advice and guidance with regard to new and unique training procurement strategies and methodologies.

Each Departmental element will be responsible for the implementation of the Plan, as an integral piece of Workforce 21, and will be held accountable for carrying out the actions in the Plan.

IMPLEMENTATION: PHASED APPROACH 1999-2001

Assumptions made in the preparation of this Section are realistic yet conservative. Recognizing that a systematic approach to identify and track Federal and contractor training costs is still under development, a companion Implementation Plan to address the full implementation of the activities in this plan has been developed. The Implementation Plan will monitor the progress and outcomes of the Performance Objectives as outlined in the Business Plan.

It is assumed that the Business Plan and its associated tasks will be carried out within existing budgets (Fed/Contractor staff) in FY-1999, and FY-2000. However, this does

not include necessary resources for the revisions and implementation of the Technical Qualification Program to address Defense Nuclear Facility Safety Board Recommendation 93-3, nor does it include the any additional resources that may be required to carry out the Executive Order 13111. Budget and resource requirements to address these areas will be addressed by the Management Council.

It is the Management Council's assumption that, through completion of a number of the performance actions under specific Performance objectives as well as continued partnering/partnerships/alliances of training organizations (federal and contractor), that FY99 will establish the Corporate Education, Training and Development Business Plan baseline.

Annual Implementation Plan

An Annual Implementation Plan is developed as an appendix to the Business Plan (Appendix E). The Implementation Plan is a compilation of Performance Action Sheets that identify what actions will be taken toward meeting the performance objectives each the fiscal year.

The Performance Action Sheets include the Performance Objectives, Expectations, Measures and Actions as well as labor and cost estimates required to complete the Actions. The Performance Action Sheets identify the Program Element or Field Office responsible for completing the tasks. The Executive Secretary of the Management Council has responsibility for oversight of the Annual Implementation Plan and reports on the progress of the Plan at Management Council meetings.

The Performance Action sheets are used by the Task Managers as "roadmaps" to reach the Performance Expectations. Task Managers can revise Performance Action Sheets with the concurrence of the Executive Secretary of the Management Council. The Management Council can request that new Performance Actions be undertaken during the fiscal year as conditions warrant and resources allow.

Before the start of the new fiscal year, the Annual Implementation Plan is reviewed, revised as necessary and submitted to the Management Council for approval. Costs for the upcoming fiscal year are calculated and the Management Council recommends to the Deputy Secretary how to commit resources to finance the Annual Implementation Plan.

A table summarizing the estimated costs for all the Performance Actions in the FY99 Annual Implementation Plan is included on the following pages. The Department will work within existing budgets to accomplish the first year milestones as identified in the Performance Action Sheets.

Tasks	Start Date	End Date	Fed Hrs.	Fed Cost	Contr Hrs.	Contr Cost	Travel
Task 01-01 Training Needs Assessments							
Task 01-02 Individual Training and/or Development Plans	01-15-99	11-01-00	2036	\$111,980.00	1741	\$69,640.00	\$0
Task 01-03 Annual Training Plans							
Task 01-04 Federal Technical Capability Program Support and Development	04-01-98	12-31-99	3410	\$187,550.00	4000	\$220,000.00	\$0
Task 01-05 Management and Supervisory Training	10-05-98	05-03-99	496	\$27,280.00	0	\$0.00	\$0
Task 01-06 Succession Planning							
Task 02-01 Average Training Cost Per Employee	12-22-98	02-6-01	454	\$24,970.00	0	\$0.00	\$0
Task 02-02 Duplicate Training Courses	01-04-99	07-30-99	840	\$46,200.00	246	\$13,530.00	\$1,476
Task 02-03 Training Centers of Excellence	11-30-98	09-30-01	1488	\$81,840.00	360	\$19,800.00	\$4,000
Task 02-04 On-the-job Training Guides	09-04-98	12-31-99	156	\$8,580.00	40	\$2,200.00	\$0
Task 02-05 Career Development-related Details and Rotational Assignments	01-04-99	07-31-99	0	\$0.00	696	\$38,280.00	\$3,600
Task 02-06 Unfunded Training Mandates	04-05-99	11-05-99	144	\$7,920.00	0	\$0.00	\$0
Task 03-01 CHRIS Training Administration Module	09-01-98	10-01-99		\$0.00		\$0.00	
Task 04-01 Training Partnerships/Regional Training Councils	01-04-99	01-31-01	1872	\$102,960.00		\$0.00	\$2,000
Task 05-01 Technology-Supported Learning Program	10-01-98	12-31-99	480	\$26,400.00	940	\$51,700.00	\$0

Tasks	Start Date	End Date	Fed Hrs.	Fed Cost	Contr Hrs.	Contr Cost	Travel
Task 06-01 DOE Corporate Handbook of Training Standards, Criteria and Metrics	02-01-99	12-01-99	288	\$15,840.00	456	\$25,080.00	\$0
Task 06-02 Revised DOE Order 360.1	10-01-97	11-30-99	3004	\$165,220.00	0	\$0.00	\$4,000
Task 07-01 Reinvestment Strategy							
Task 08-01 Administration of the Corporate Education, Training and Development Program							
Task 08-02 Evaluation of the Corporate Education, Training and Development Program							
Task 08-03 Customer Satisfaction							
Task 09-01 New Chapter to DOE Order 350.1 Contractor Human Resource Management Programs							
Task 09-02 Contractor Training Performance Objectives and Measures							
Totals			14668	\$806,740.00	8479	\$440,230.00	\$15,084

ANTICIPATED VALUE

The Business Plan and its associated performance objectives reflect the “start-up” costs of implementing a sound business approach to address the education, training and development needs of the Department’s workforce. The conservative cost estimates reflected in the Performance Action Sheets will provide for a (1) corporate education, training and development infrastructure, (2) Departmental training policy framework, (3) corporate training management information system, (4) critical skill needs assessment(s) and development plans that are linked to DOE program objectives and missions, (5) a plan to address lifelong learning through technology, and (6) means to track training costs in a consistent manner, and (7) a method to identify training cost-savings/cost avoidance and the return on investment as a result of implementing the Business Plan.

The most important value to be derived from the Business Plan are the benefits to our investors and stakeholders - employees, management, Congress and the taxpayer. Implementing the Business Plan will lead to improvement in assessing critical workforce skills, in the methods of providing training design, development and delivery, and in overall job performance. For example, some areas where investment in the Business Plan will provide for significant benefits are:

- C Safety of the DOE workforce
- C Clean-up of DOE sites
- C Research and development activities of the Department
- C Maintenance of nuclear facilities and nuclear criticality safety

EVALUATING PLAN EFFECTIVENESS

The Department intends to evaluate the progress of the Corporate Education, Training and Development Business Plan using a balanced-scorecard approach which solidifies an organizations focus on future success by setting objectives and measuring performance from four distinct perspectives – Learning & Growth, Internal, Financial, and Customer perspectives. This approach aligns individual, organizational and cross-departmental initiatives and will identify entirely new processes for meeting customer and stakeholder objectives. It will also be used as a learning system for testing, gaining feedback and updating the organization’s training, education, and career development programs.

In addition to the balanced-scorecard approach, the Department will continue its benchmarking activities with regard to training costs, and will also incorporate performance measures that will address the Department of Energy Human Resources Management Accountability Program and the Business Management Oversight Program requirements for federal and contractor organizations.

Return on Investment is usually determined by dividing Net Program Benefits by Program Costs. Until a comprehensive review of Department of Energy training facilities and capabilities has been achieved, which is one of the GAO recommendations and will begin in FY-1999, it will be difficult to ascertain a specific return on investment as a result of

implementing the Business Plan. It will be critical to integrate the needs assessment process with overall evaluation processes before deciding how the Department will determine the return on investment of the Business Plan and its associated tasks. However, the Department is committed to establishing a process that will allow training organizations to assess cost-savings, cost-avoidance, and the overall return on investment of the Department's training, education, and career development programs.

SUMMARY

The Education, Training and Development Business Plan is the Department's roadmap to the Year 2000 and beyond. This Plan outlines the objectives and actions needed to improve and maintain the competence of a talented, diverse workforce in an integrated, cost-effective and quality manner. The following elements must be in place to be successful:

- < ***Endorsement of the Secretary of Energy***
- < ***Commitment from each member of the Management Council to foster the implementation of the Plan***
- < ***Support of all Principal Secretarial Officers, Field Site Managers, and Line Managers and Supervisors***
- < ***Funding and other resources necessary to carry out this Plan***

Section V

APPENDICES

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APPENDIX A

Cost Savings/Avoidance Attributed to Training Centers of Excellence

National Environmental Training Office (NETO)

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APPENDIX B

Cost Savings/Avoidance Attributed to Training Centers of Excellence

Safeguards & Security Central Training Academy

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APPENDIX C

Revised Implementation Plan for Improving DOE Technical Capability in Defense Nuclear Facilities Programs

**(Revised Implementation Plan for
Board Recommendation 93-3)**

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APPENDIX D

DOE Strategic Plan Reference

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APPENDIX E

Annual Implementation Plan

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